

Appendix B: Matrix of Personnel Experience
 (Application for Approval as a Nonprofit Budget and Credit Counseling Agency)

NAME OF AGENCY: _____										
ADDRESS: _____										
FEDERAL TAX ID #: _____										
Credit Counseling Counselor Qualifications	Employee #1	Employee #2	Employee #3	Employee #4	Employee #5	Employee #6	Employee #7	Employee #8	Employee #9	Employee #10
EDUCATION - Highest Degree Received (check one)										
High School	<input type="checkbox"/>									
A.D.	<input type="checkbox"/>									
B.A./B.S.	<input type="checkbox"/>									
M.S.	<input type="checkbox"/>									
J.D.	<input type="checkbox"/>									
Ph.D.	<input type="checkbox"/>									
Other *	<input type="checkbox"/>									
COUNSELOR CERTIFICATION (check all that apply)										
NFCC	<input type="checkbox"/>									
AICCA	<input type="checkbox"/>									
CFP	<input type="checkbox"/>									
AFC	<input type="checkbox"/>									
CPA	<input type="checkbox"/>									
Other *	<input type="checkbox"/>									
EXPERIENCE (state years of experience)										
Credit Counseling	<input type="checkbox"/>									
Personal Financial Management	<input type="checkbox"/>									
Consumer Credit Education	<input type="checkbox"/>									
Financial Planning	<input type="checkbox"/>									
Consumer Economics	<input type="checkbox"/>									
Marketing	<input type="checkbox"/>									
Sales	<input type="checkbox"/>									
Other *	<input type="checkbox"/>									
BACKGROUND (check if employee background check has been completed in last five years with no criminal conviction for fraud, dishonesty, or false statements)										
Criminal Check	<input type="checkbox"/>									
No Criminal Conviction	<input type="checkbox"/>									

* Disclose on separate page.

(June 2005)